

# Overview – Solution Package

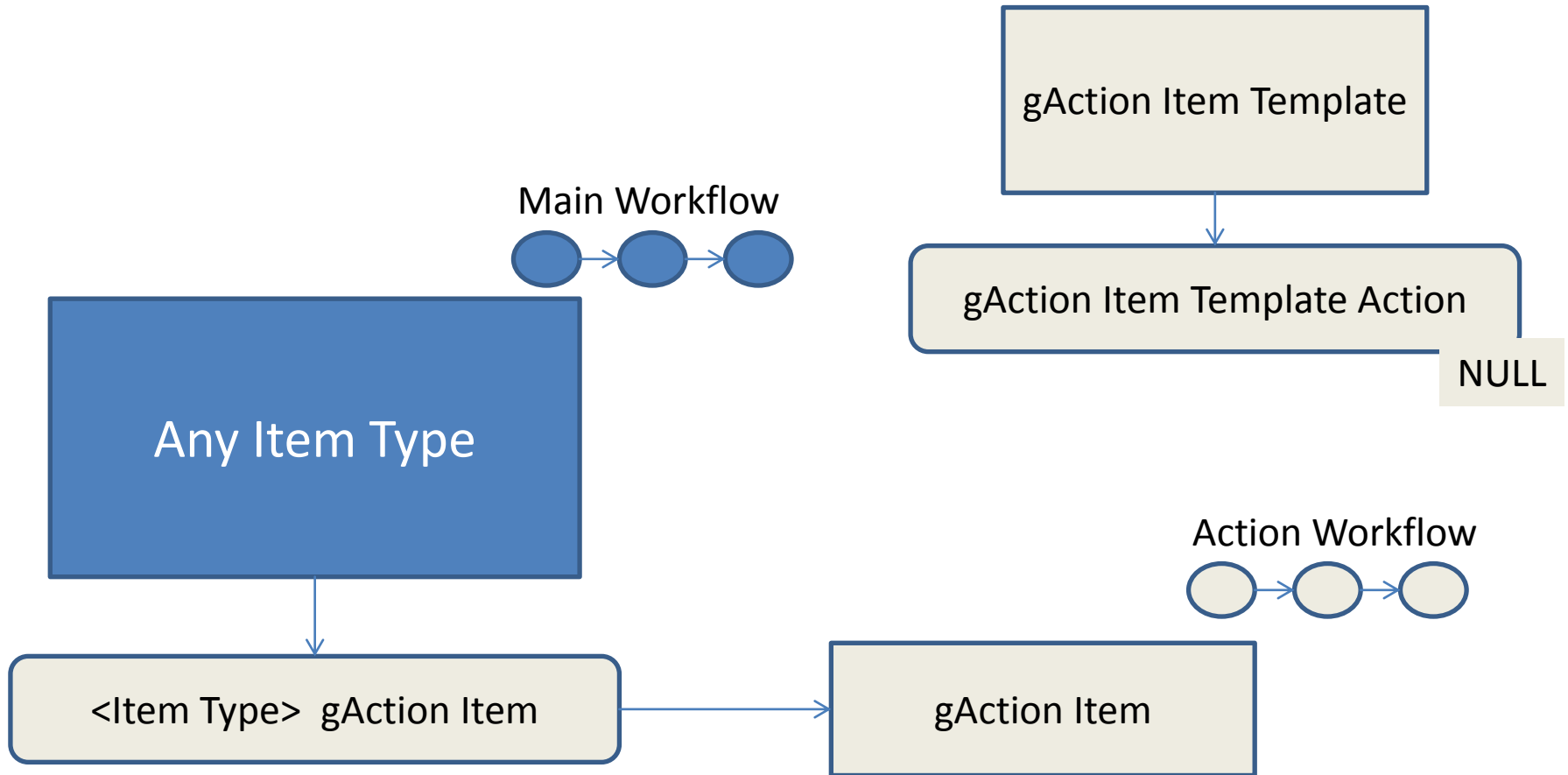
## „generic Action Item vX “

- Many times when creating a custom workflow and its form in Aras Innovator or when extending existing processes there can be a requirement to have sub-workflows to follow-up on additional actions or “ToDo’s”. Of course, these sub-workflows then have to be created “ad-hoc”. A common way here is to add a relationship listing actions to do and there point to an item with a workflow, so it shows you the InBasket of an action’s owner.
- This solution package will exactly address this. The new “generic Action Item” type is designed to be re-used whenever you want additional Actions listed on a process’ form. (this idea was inspired by the existing community solution for “meeting minutes” on projects)
- An example how this additional functionality can be re-used, once imported, is also part of this package. Adding an “Action Items” tab to the standard “Express DCO”
- A second new item type „gAction Item Template“ is used to allow managing a set of „standard Actions“ (by Administrator for example) that will „instantiate“ triggered from your process on which you added the „Action Items“ tab. (Trigger can be a custom action, like in the example, or by custom logic using the Aras Innvator API)

# Installation

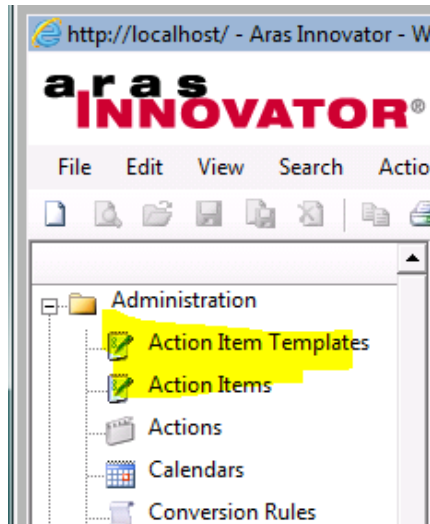
- Use the Aras PackageImportExportUtilities to import the package „generic Action Item vX “
  - There are multiple import cycles you have to do in exactly this order.
  - Log in as „admin“ and use „merge“ option for all steps
  - Folder: 1-Import - Generic Action Item Functions
    - Import: “generic Action Item”
  - Folder: 2-Import - Example on DCO (optional)
    - 1-Import: „generic Action Item - on Express DCO”
    - 2-Import: “PLM” (adds new action to DCO)
- You MUST use the „Merge“ option.
- Done

# Data Model



# Working with Action Items

Access to Action Items and Templates for „Administrators“



Access to Action Items via InBasket for all users

A screenshot of the Aras Innovator web application interface showing the 'InBasket' view. The browser address bar shows 'http://localhost/ - Aras Innovator - Windows Internet Explorer'. The application logo 'aras INNOVATOR®' is at the top. Below it is a menu bar with 'File', 'Edit', 'View', 'Search', 'Actions', 'Reports', 'Tools', and 'Help'. A toolbar with various icons is visible. On the left, a tree view shows the 'My InBasket' folder selected. The main content area displays a table of action items with filters for 'Type' and 'Status'.

Filter by Type: ☒ Workflow Activities ☐ Project Activities ☐ Action Items

Filter by Status: ☒ Active ☐ Pending

Type	Workflow/Project	Activity	Status	Start Date	End Date	Instructions
DCO-00001001		Planning	Active	12/6/2012		Perform DCO Planning
AI-00002	Add more Action Items for each document owner once DCO is 'In Work'	Open	Active	12/6/2012		Please start your work ...
AI-00002	Add more Action Items for each document owner once DCO is 'In Work'	Open	Active	12/6/2012		Please start your work ...

# gAction Item – ItemType, Life Cycle Map, and Workflow Map

Use List „gAction Item Types“ to add your types

http://localhost/ - Action Item - AI-00002 Add more Action Items for each document owner once D - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Number AI-00002 Created On 12/6/2012 8:39:22 PM Due Date 12/8/2012 Prio Medium Status Open Closed On

Type Generic Description Add more Action Items for each document owner once DCO is 'In Work' Closing Notes

Action Item

☐ Closing Notes Required

Action Owner Innovator Admin

SignOffs

### Workflow History Report

Item: AI-00002 Add more Action Items for each document owner once DCO is 'In Work'

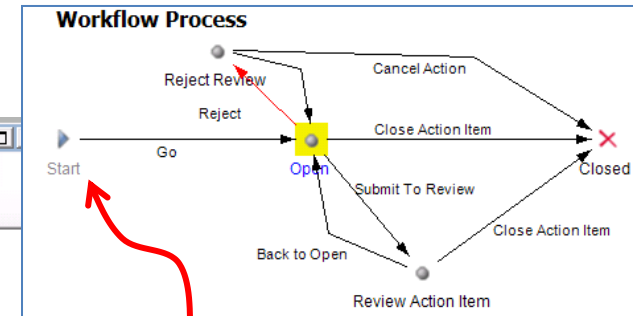
Current Status is: Active

Started By: Innovator Admin Started On: 12/6/2012 8:39:36 PM Completed On:

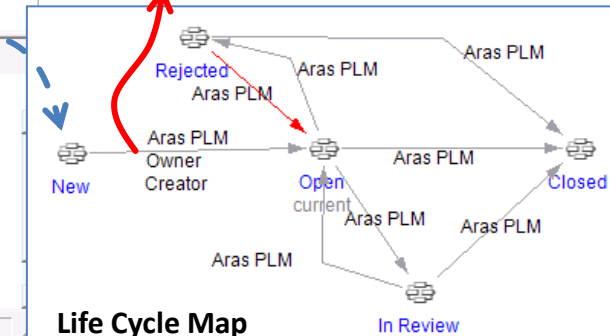
Activity	State	Assigned To	Completed By	How Voted	When	Comments
Open	Active	Innovator Admin		VOTE NOW		

Ready

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Transaction starts the workflow



# „gAction Item Template“

Valid RelationshipType you added to your process

If set, instance of Action item will auto-promote to „Open“

http://localhost/ - Action Item Template - generic\_action Express DCO default Actions (read onl - Windows Internet Explorer)

File Edit Views Search Actions Reports Tools Help

Status: New

Template Name: Express DCO default Actions

Use With Process (ItemType Name): Express DCO

Add This Relationship To Process: Express DCO qAction Item

Action Item Type: Generic

Action Sub Type:

Template Owner: Administrators

☐ Start Related Action

Template Actions

Actions: No Related

Pos	Priority	Description	Action Default Owner ...	Action Default Review...	Due Date Offset (...)	Closing Notes Required
1	Medium	Add more Action Items for each document owner once DCO is 'In Work'	Owner		2	<input type="checkbox"/>

Ready Items 1-1 of 1. Page 1 of 1

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# Action Items Example on „Express DCO“

The screenshot displays the Express DCO web application interface. The top navigation bar includes 'File', 'Edit', 'Views', 'Search', 'Actions', 'Reports', 'Tools', and 'Help'. The 'Actions' menu is open, showing 'Check for Completeness' and 'Add Action Items from Template'. A yellow callout bubble points to the 'Add Action Items from Template' option with the text 'Sample logic adds Action Items from Template'.

On the left sidebar, there is a 'DCO' section with a 'New' button and a 'Priority' dropdown menu with options: '1 - High', '2 - Normal', and '3 - Low'. Below this is a 'Release Date' field.

The main content area shows a form for 'TEST 111' with fields for 'Change Reason', 'Change Coordinator' (Innovator Admin), 'Team' (Product Team), and 'Change Description'.

At the bottom, there is a table with columns: 'Pos', 'Type', 'Status', 'Description', 'Owner [...]', 'Due Date [...]', and 'Prio'. The table contains one row with the following data:

Pos	Type	Status	Description	Owner [...]	Due Date [...]	Prio
128	Generic	Open	Add more Action Items for each document owner once DCO is 'In Work'	Innovator Admin	12/8/2012	Medium

A yellow callout bubble points to the 'Create Related' button in the 'Actions' menu with the text 'Manually add „adhoc“ Action Items'.

The bottom status bar shows 'Items 1-1 of 1. Page 1 of 1' and the 'ar.s INNOVATOR' logo.

# Example Configuration: Express DCO Action Item Tab

The screenshot shows a web browser window titled "http://localhost/ - RelationshipType - AE3B95F1455B4D2FB1C82BB7CBB6FCA7 - Windows Internet Explorer". The browser's menu bar includes File, Edit, Views, Search, Actions, Reports, Tools, and Help. The toolbar contains various icons for file operations and navigation. The main content area is titled "RelationshipType" and features a blue and white background with a chain-link icon. The configuration is organized into several sections: 

- General:** Includes a checked "Auto Search" checkbox, a "Sort Order" dropdown, and a "Default Page Size" input field.
- Name:** A text field containing "Express DCO gAction Item".
- Label:** A text field containing "Action Items".
- Description:** An empty text field.
- Paste Defaults:** Includes checkboxes for "Copy Permissions" and "Create Related", both of which are unchecked.
- Source:** A text field containing "Express DCO" and a "Hide In All" checkbox, which is unchecked.
- Related:** Includes a "Related ItemType" text field containing "gAction Item", "Min Occurs" and "Max Occurs" input fields, a "Behavior" dropdown set to "Float", and a "Grid View" dropdown set to "Intermix".
- On New Related Option:** Includes radio buttons for "Pick Only", "Pick & Create", and "Create Only" (which is selected). It also has a checked "Requires Related" checkbox and an unchecked "Open Related Form" checkbox.

Must be set to always create new relationship that must have a new related item.